

# Quarterly Workforce Planning Meeting Minutes—July 27, 2015

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## CalHR Updates

### California State Audit (CSA) Updates

In response to the May 2015 [High Risk Audit of CalHR](#), CalHR's Statewide Workforce Planning and Recruitment Unit (SWPRU) has requested Strategic Plans, Workforce Plans, Succession Plans and other related material in order to determine the current state of workforce planning within California State Departments, and compile a statewide workforce plan. Current responses: Completed plans = 16; revising plans = 3; plans in progress = 20; plans not started = 24; status unknown = 26. If your department has yet to respond, or you are unsure if your department has responded, email [wfp@calhr.ca.gov](mailto:wfp@calhr.ca.gov) to touch base or request assistance from our unit.

CSA is seeking to mandate workforce planning—no determinations have been made at this time.

### Civil Service Improvement (CSI) Updates

#### CSI Recruitment

Several workgroups have been established to improve recruitment efforts for the State of California.

#### CSI Workforce and Succession Planning

This workgroup has been established to improve workforce planning efforts for the State of California.

To be a part of either of these prestigious initiatives, and provide input on topics directly affecting your department, contact [wfp@calhr.ca.gov](mailto:wfp@calhr.ca.gov).

### New Tools and Resources

Workforce and Succession Planning Evaluation Tool—Currently available [online](#).

CalHR's Five Phase Workforce Planning Model—To be released August 2015

CalHR's Three Part Succession Planning Model—To be released August 2015

Workforce Planning Model Comparison Matrix—To be released August 2015

## **Statewide Leadership Program**

CalHR is currently revising the 80 hour Supervisory Training, and developing a Statewide Leadership Model. For more information about these initiatives view the brochure attached to the email, CalHR Conference Half Sheet.

## **Recruitment and Retention Program (RRP) Update**

The RRP is currently being finalizing based on recent executive updates. The program will continue through a second round of reviews by CalHR's legal and labor divisions. The good news is we are still getting the support we need to proceed.

## **Class Consolidation Update**

491 classifications have been abolished to date. The project is currently transitioning from abolishment to consolidation, which includes identifying the remaining number of classes, as well as an expected end date to the project. All questions pertaining to class abolishment and consolidation can be sent to [classabolishment@calhr.ca.gov](mailto:classabolishment@calhr.ca.gov).

## **Workforce Planning Professionals Group is Growing**

If you have access to a conference room that seats up to 70 people and has video conferencing capabilities, please let us know if you would be willing to host the next quarterly meeting. Email [wfp@calhr.ca.gov](mailto:wfp@calhr.ca.gov).

## **Open Discussion**

### **Workforce Planning Teams**

Workforce planning can be pursued under circumstances with limited resources. Regardless of a department's size, workforce planning is not the responsibility of one division/program area. Although there may be one person responsible for coordinating the effort, a dedicated Steering Committee should be established to serve as the support team for workforce planning efforts. For more information on Steering Committee members and roles and responsibilities, reference the [Steering Committee Roles and Responsibilities](#).

If it is necessary to narrow the scope of workforce planning efforts due to limited resources, begin by interviewing the executive team to gain information on the top 3 – 5 workforce planning needs of the department. From there, focus on the division/program areas that have the highest impact on the top needs identified. Proceed through CalHR's Workforce Planning Model with a narrowed focus on the workforce of those high impact division/program areas.

Considerations:

- Workforce planning is a full time commitment regardless of department size, or how the responsibility is split.
- It is difficult to provide standard recommendation for the development of a workforce planning unit due to variance in departments' organizational structures, needs, size, etc.
- Systems like SAP can assist in the workload.

- Consultants can assist in facilitating the strategic and workforce planning process, but resources need to be dedicated to implementing and maintaining programs.

## Gaining Executive Support for Workforce Planning

To gain support of the executive team, and other critical stakeholders, conduct a risk assessment illustrating the business need for workforce planning, and cost associated with lack of planning. For example, the potential impact of retirements, transfers and other separations on cost of training new employees, cost of loss or delays in services, etc. This can be done within a smaller case study context or a comprehensive workforce analysis.

- Case study: Identify one or more division/program areas experiencing recruitment, retention, knowledge transfer and/or succession planning challenges. Interview division/program area managers and supervisors to gain information on how these challenges are impacting their division's critical functions, and the overall department mission. To assist in gathering division/program area input utilize the [Survey and Development Tool](#) (online version also available).
- Comprehensive workforce analysis: Analyze department-wide workforce data to illustrate demographic and separation trends. Compare the department's workforce trends to statewide demographic and retirement trends for perspective.

Maintain executive and stakeholder support throughout the process by delivering continuous communication about progress, accomplishments, small and large wins, and other successes and impacts to the department. Collect, analyze and present data to gain management support.

Recommended data and techniques:

- Retirement projections and risk.
- Employee satisfaction surveys.
- Put into a business context.
- Class and Pay manual can provide guidance on justifying recruitment needs.
- Use short presentations that illustrate need in a clear and concise manner.
- Provide Executive team with CSA report to illustrate relevance and urgency of workforce planning for the State of California.
- Utilize case study method.
- Utilize CalHR's Survey and Development Tool to gain information about the needs of division and program areas.

## Getting Started

To understand how to begin organizing and developing your workforce plan and efforts:

- Start with a data sheet.
- The Workforce Plan Template may help you organize pertinent workforce planning information.
- Utilize the Workforce and Succession Planning Evaluation Tool to assist in anticipating critical milestones.

- Do your plan in phases, organize by classification level, geographical area, occupational groups, etc.

## **Strategic Planning**

Link workforce planning to strategic planning. If strategic planning has not been completed begin the process by:

- Performing an Environmental Scan which entails looking at changes to the internal and external factors that could occur in the future and how these changes could impact the workforce.
- Performing a SWOT (Strengths- attributes of the organization that are helpful to achieving strategic goals, Weaknesses - attributes of the organization that are detrimental to achieving strategic goals, Opportunities - external conditions that are helpful to achieving strategic goals, and Threats - external conditions that are detrimental to achieving strategic goals) analysis to reveal critical missions and functions.

Other resources:

[DOF Strategic Plan Guidelines](#)

[United States Office of Personnel Management Guidance for Agency-Specific Diversity and Inclusion Strategic Plans](#)

## **Short and Long Term Objectives for CalHR**

Short and long-term objectives for collecting and evaluating workforce plans:

- Understand workforce planning in the State of California.
- Evaluate department needs to improve our services to you.
- Develop and improve Statewide Workforce Planning and Recruitments Unit consultative services.
- Compile statewide data to produce a statewide workforce plan.

## **EEO & Workforce Planning**

Differences between Workforce Planning and Workforce Analysis.

- Agencies must comply with workforce analysis (WFA) requirements by developing hiring goals and action plans when necessary to meet legal requirements that ensure EEO.
- Workforce Planning is currently a voluntary effort to ensure departments have strategies to recruit and retain the most qualified workforce.

Tips:

- Send managers to best hiring practices training.
- Have diverse hiring panels so there is not subconscious hiring bias.

## Recruitment strategies

- Post job announcement on VPOS as well as external sources such as job search engines and university career centers.
  - Examples:
    - University of Enterprise
- Request information about where candidates heard about the position to understand which strategies are useful.
- Develop engaging and concise job announcements that attractively markets your department and the job. Steer away from technical jargon.
- A current initiative is underway to develop a state hiring fair that will have onsite testing. If you are interested in providing feedback regarding this fair email [wfp@calhr.ca.gov](mailto:wfp@calhr.ca.gov)

## Bridging analysts into supervisory and management.

CalHR is currently offering the following trainings:

- Making a Transition to Supervisor
- Stepping up to Lead

Visit the [Training Calendar](#) for offerings.